SaaS Management Certification Assessment Standard v2

Discovery, Inventory, and Normalisation	Core/Optional	Answer	Pass standard	Guidance
Which Discovery Capabilities does your tool make use of?	Core	Free text	More than one method ava	SSO, API, Browser Plugin, CASB, Firewall, Finance, etc
Does the tool provide a method for detecting free SaaS apps?	Core	Yes/No	Yes	Detecting free apps is essential for risk management and privacy use cases
Which Accounting & Expense Systems can it use for Discovery?	Core	Free text	Ability to integrate with at	e.g. Concur, Expensify, Sage, Coupa, NetSuite
How many SaaS application API connections does it ship with?	Core	Number	Minimum 5	List direct/advanced connections providing rich usage and entitlement data
Are users able to request or develop custom API connectors	Optional	Yes/No	Yes	API discovery is the gold standard, if a customer has a need for a connection that's not out-of-the-box can they develop it, have it provided by a partner, etc.
Does it require the use of an installed software agent or browser plugin?	Optional	Yes/No	Informational - not scored	e.g. "traditional" ITAM inventory/discovery methods
Can it differentiate between personal and corporate usage of SaaS apps?	Optional	Yes/No	Informational - not scored	Important for privacy and security use cases
Does it integrate with IAM/SSO tools?	Core	Yes/No	Yes	e.g. Okta, OneLogin, Azure Active Directory
Does the tool gather application usage data?	Core	Yes/No	Yes	Application Usage data is essential for optimisation
Can it combine inventory and discovery data from mutliple sources into a single record?	Core	Yes/No	Yes	e.g. combine data from an API & Azure Active Directory to provide a rich view of user-based app usage
Does the tool provide methods for assessing data quality?	Core	Yes/No	Yes	For example, showing how rich a record is by indicating when it was discovered and by which discovery methods it was found
Does the tool highlight "Known Unknowns"	Core	Yes/No	Yes	For example, highlighting that a user record (from AD or similar) has no discovered application usage
Does the tool allow entitlement records to be created manually?	Core	Yes/No	Yes	For SaaS apps without automated entitlement discovery, or where a connection to a finance system isn't available - can users create their own records?
Does the tool provide an application catalog?	Core	Yes/No	Yes	Tool should have a software recognition library or similar, providing authoritative recognition of discovered applications
Does the tool detect the subscription tier in use?	Core	Yes/No	Yes	e.g. Office F1 vs E5, Zoom Standard vs Pro
Does the tool timestamp records?	Core	Yes/No	Yes	Timestamping of discovered entities (users, usage, applications, etc.) is essential for assessing data quality, discovering blindspots, and trending usage
Does the tool detect application bundles?	Optional	Yes/No	Informational - not scored	For example, detecting that individual Adobe CC apps may (or may not be) part of the overall Creative Cloud Suite
Does the tool enable batch import of entitlement information – for example from other tools or your own records such as procurement or finance applications?	Optional	Yes/No	Informational - not scored	Batch import functionality is less desirable than automated methods but may be useful for certain applications, environments, or deployment scenarios

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Optimisation	Core/Optional	Answer	Pass standard	Guidance
Does the tool provide a renewals calendar?	Core	Yes/No	Yes	Tools should provide a method for users to generate a calendar of upcoming renewals, including easy access to usage data, renewal cost, and renewal date
Does the tool gather rich usage data including user, last used date, usage frequency	Core	Yes/No	Yes	Rich usage data is required for optimisation based on usage - when did the user last use the application, how frequently does she use it, etc.
Does the tool automatically flag unused subscriptions based on definable time limits	Core	Yes/No	Yes	For example, providing a dashboard/report of subscriptions per user not used for 30 days
Does the tool provide an application category view?	Core	Yes/No	Yes	For example, a single view of all file sharing applications in use
Does the tool provide a list of subscription contracts per vendor?	Core	Yes/No	Yes	For example, highlight that there are 5 separate contracts for Salesforce
Can tool users assign expenditure/subscriptions to corporate entities?	Core	Yes/No	Yes	e.g. affiliates, departments, teams, geographies
Does the tool provide a report/view showing overlapping application category usage?	Core	Yes/No	Yes	For example, a single view of the usage of conferencing applications
Can identified/actionable optimisation opportunities/workloads be triggered from within the tool or passed to external systems for action?	Optional	Yes/No	Yes	For example, automated deprovision of a subscription via direct integration with vendor portal
Does the tool enable identification and remediation of overlapping application category usage per user?	Core	Yes/No	Yes	For example, show where a user has subscriptions to three project management applications
Does the tool enable Application Owners to be assigned to individual applications?	Core	Yes/No	Yes	De-centralised spending on SaaS means that Application Owners may be outside IT and will need to be engaged in optimisation activities by the SaaS Management team
Does the tool enable user profiles to be generated, to aid onboarding/offboarding?	Optional	Yes/No	Informational - not scored	User profiles contain the list of all applications employees in that role should receive, streamlining the onboarding process

Reporting	Core/Optional	Answer	Pass standard	Guidance
Do methods exist to enable SaaS Management data contained within the tool to be surfaced in external reporting tools and services?	Optional	Yes/No	Yes	For example, via a Reporting API, or integrations with PowerBI, Tableau, etc.
Does the tool retain audit records for datapoints and user actions?	Core	Yes/No	Yes	Audit trails will be important for some industries, in order to prove which actions were performed by whom and at what time
Does the tool provide forecasting/budgeting capabilities?	Core	Yes/No	Yes	Tool should enable SaaS Managers to provide expenditure reports for entities such as individuals, departments, and divisions, to aid budgeting
Is trend information retained for applications and/or users?	Core	Yes/No	Yes	Trend information is required to prove ROI - showing how a subscription position has changed over time
Can dashboards be created for individual stakeholders/roles?	Core	Yes/No	Yes	Stakeholder engagement is necessary in order to manage departmental spend, it is important to be able to provide users with just the data they need to meet SaaS Management goals, without giving access to the full system (e.g. Sales can only see data

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Risk Management	Core/Optional	Answer	Pass standard	Guidance
Does the tool enable approved/prohibited application lists to be created and maintained?	Core	Yes/No	Yes	Organisations may wish to track usage of approved/prohibited applications for a variety of risk management deliverables
Does the tool report on the compliance certification status of a SaaS application?	Core	Yes/No	Yes	For example, SOC2 compliance
Does the tool report application permissions which are potentially harmful?	Core	Yes/No	Yes	For example, highlighting that a calendar application has read/write/delete rights to an entire mailbox
Does the tool enable user profiles to be generated?	Core	Yes/No	Yes	For example, in order to report on applications being used by a user that aren't required by their role
Does the tool integrate with sources of vulnerability tracking information?	Core	Yes/No	Yes	e.g. integrate with CVE database to highlight an application has potential vulnerabilities
Does the tool retain audit records for datapoints and user actions?	Core	Yes/No	Yes	Audit trails will be important for some industries, in order to prove which actions were performed by whom and at what time
Does the tool provide a means to store metadata about an application or vendor?	Core	Yes/No	Yes	For example, tracking financial status of vendor, headquarters, datacenter locations, leadership team
Does the tool enable SaaS Managers to allocate a status to an application or vendor?	Core	Yes/No	Yes	For example, tagging a vendor as Partner, Strategic, Tactical, Transactional, Unmanaged, etc.

Automation & Integration	Core/Optional	Answer	Pass standard	Guidance
Is inventoried data made available to other systems (e.g. via a REST API)	Optional	Yes/No	Informational - not scored	Trustworthy data should be shared with other systems of record to provide full visibility for multiple stakeholders
Is a self-service Enteprise App store provided	Optional	Yes/No	Informational - not scored	Can users submit application provisioning requests for approval/provisioning via an integrated application store/catalog
Does the tool integrate with HRIS or IAM systems to enable either automated or manual onboarding/offboarding of employees	Optional	Yes/No	Yes	For example, providing a checklist of applications to be provisioned/deprovisioned
Can the tool integrate with Vendor or Contract Management applications?	Optional	Yes/No	Informational - not scored	These systems have potential to streamline SaaS optimisation through integrated management of renewals
Can identified/actionable optimisation opportunities/workloads be triggered from within the tool or passed to external systems for action?	Optional	Yes/No	Yes	For example, automated deprovision of a subscription via direct integration with vendor portal